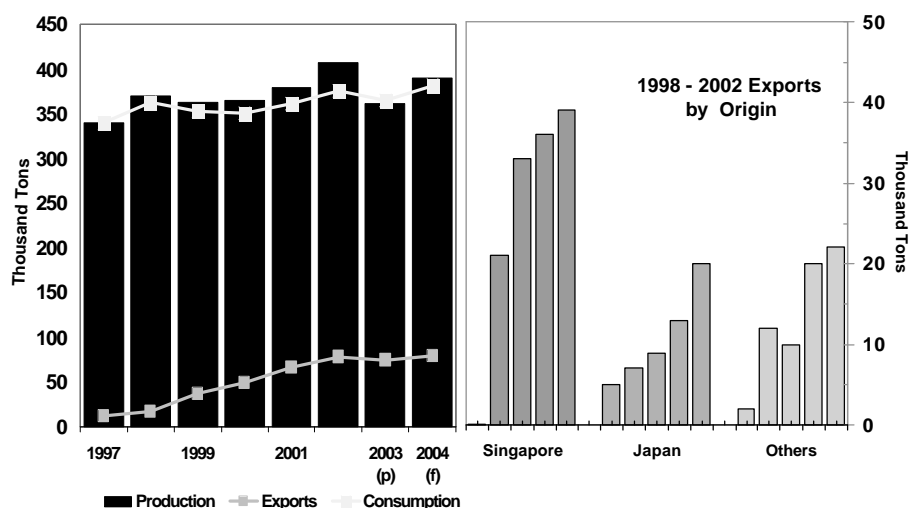


Australia's Pork Situation

	1997	1998	1999	2000	2001	2002	2003(p)	2004(f)
(1,000 tons; CWE)								
Beginning Stocks	0	0	0	0	11	1	10	1
Production	339	369	362	365	379	407	361	390
Imports	12	10	28	45	38	55	70	75
Exports	12	17	37	49	66	78	75	80
Consumption	339	362	353	350	361	375	365	381
Ending Stocks	0	0	0	11	1	10	1	5

Australian Pork Production Expected to Increase in 2004; Even as Imports Grow, Australia Remains a Net Exporter



The Australian pork industry has undergone considerable consolidation. Nationally, there are currently about 2,500 pork producers, which is down sharply from the 50,000 that were in business in 1960. The industry is also now characterized by a relatively small number of very large operators, with approximately 80 percent of all pork production accounted for by about 20 percent of producers. The pig crop number for 2003 is projected at 5.40 million head, two percent lower than in 2002. The pig crop in 2004 is forecast to rise two percent, to 5.51 million head. A return to more normal weather conditions in 2004 is expected to allow the industry to resume its longer-term incremental growth in inventory numbers. In recent years, Australia's pork exports have grown considerably, rising from less than A\$71 million in 1998/99 (July/June) to almost A\$250 million expected in 2002/03. Australia, which typically shipped frozen pork to New Zealand, the EU and assorted Asian markets, has now significantly expanded these exports, principally to markets in Japan, Korea and the Philippines. In addition, Australia's exports of fresh/chilled pork, which were less than 200 MT in the mid 1990's, have risen to over 40,000 MT. Most of Australia's fresh/chilled pork exports are destined for Singapore and Japan.

Australia

PORK EXPORTS

(in metric tons)

Fresh/Chilled								
Destination	1995	1996	1997	1998	1999	2000	2001	2002
China	0	0	0	0	10	0	265	50
EU-15	0	0	0	150	531	17	13	20
India	0	0	4	23	57	47	42	43
Indonesia	3	2	11	16	30	18	39	52
Hong Kong	1	16	0	201	320	582	580	185
Japan	53	30	434	1,482	1,732	4,031	7,046	11,784
Korea, South	0	3	17	69	46	143	722	225
Nauru	24	20	69	48	1	17	29	54
New Zealand	82	114	1	123	9	43	598	309
Papua New Guinea	3	21	0	50	21	13	36	57
Philippines	0	0	0	0	8	17	480	141
Russia	0	23	46	44	0	0	3	171
Samoa (Western)	0	0	0	0	0	0	49	39
Singapore	2	16	6	47	15,344	24,058	27,972	29,217
Taiwan	0	0	0	0	0	4	32	55
United States	0	0	0	0	0	1	40	0
Others	22	19	41	34	74	50	44	144
Total	190	264	629	2,287	18,183	29,041	37,990	42,546

Frozen								
Destination	1995	1996	1997	1998	1999	2000	2001	2002
EU-15	2,401	2,716	2,291	2,456	3,125	2,460	3,760	641
China	32	15	83	32	15	226	642	881
Fiji	26	26	70	47	143	16	29	134
Hong Kong	115	86	183	532	741	279	389	508
India	0	1	0	1	0	4	18	1
Indonesia	87	122	39	0	6	38	58	29
Japan	114	247	2,552	2,900	2,965	2,753	3,086	3,125
Korea, South	16	73	117	420	701	924	1,496	2,358
Nauru	132	130	108	27	104	86	81	113
New Caledonia	76	145	89	32	96	137	93	50
New Zealand	1,002	809	1,104	2,326	1,824	2,062	3,000	6,278
Philippines	166	114	228	398	706	133	1,122	2,096
Russia	260	779	1,402	1,388	67	1	77	357
Singapore	6	6	4	8	281	435	425	894
Taiwan	0	27	0	114	351	177	44	519
United States	57	20	15	79	61	0	14	18
Others	215	524	282	372	332	139	368	1,214
Total	4,705	5,840	8,567	11,132	11,518	9,870	14,702	19,216

Note: All data are reported in product weight

Source: Australia Bureau of Statistics

Australia
PORK EXPORTS
(in metric tons)

Destination	Processed							
	1995	1996	1997	1998	1999	2000	2001	2002
Hong Kong	33	174	2	4	0	2	1	105
Indonesia	8	13	10	1	1	7	6	12
Japan	1	5	0	1	0	66	0	19
Micronesia	19	5	11	8	14	17	66	34
Nauru	23	26	15	2	0	28	24	32
New Caledonia	10	17	18	13	13	19	16	32
New Zealand	29	53	21	73	206	248	155	113
Philippines	104	179	169	101	2	38	0	0
Singapore	6	5	1	5	1	8	8	9
South Korea	0	0	1	0	19	0	39	39
Thailand	6	8	7	6	5	2	1	2
Vanuatu	1	10	15	8	4	6	7	7
United States	35	0	0	0	0	0	0	0
Others	83	166	44	46	70	15	44	67
Total	358	661	314	268	335	456	367	471
Grand Total	5,253	6,765	9,510	13,687	30,036	39,367	53,059	62,336
Share to U.S.	2%	0%	0%	1%	0%	0%	0%	0%

Note: All data are reported in product weight

Source: Australia Bureau of Statistics